Design Notes: Day Three of Three-Day VSM Implementation Plan

P' = Participant   HO = Hand-out   FC = Flip Chart   PW = Participant Workbook

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  o Check-out.
  o Appreciation.
  o Adjourn.

Design Notes: Day 3 – Implementation Plan

Time/Topic	Purpose and Method	Materials Resources
7:30-8:00 **SET-UP AND PREP FOR VSM**	**Purpose:** • Participants experience a well organized, confidant, competent, and professional learning experience - all in service to enabling the team to accomplish their task and have a satisfying experience. **Methodology:** • Be sure room is clean, debris removed, and all materials and equipment organized for the day. • Meet with VSM staff and review roles, responsibilities, and any development goals. • Review the Future State map, change recommendations and calculations to assess if there is a need to highlight anything specific today.	• CS, FS, Recommendations

8:00 – 8:30
 	
START-UP IN VSM TEAM
	Purpose:
	• Clarify expectations and create a shared understanding of the direction for the day.
	• Develop as a team.
	• Reconnect with each other and the prior work.
	
	Methodology:
	• Make any introductions that are needed (staff, observers, new participants)
	• Review safety exits
	• Logistics -- restrooms, café in building, security badges (do not lose, be sure to return), breaks, lunch.
	• Review Team Learning Norms again.
	• <u>VSM Manager</u>**:**
	   ➢ Review prior VSM Process work
	   ➢ Preview today's agenda and outcomes.
	   ➢ **Remind team members that this is the beginning of an incremental change and improvement process – that this is their first cut at the plan and their first incremental step.**
	• Check-in: one word or sentence (not a paragraph) about how you are doing as we start the day today (idea, feeling, observation, etc.) Whoever starts, we will go round robin to the left until we have all checked–in.
	• Make note of any themes or patterns you noted during the check-in that could impact the work today.
		• HO Participant Workbook**:**
		
		➢Charter
		➢Statewide CS/FS maps & data sheets
		➢Plan Worksheet & Spreadsheet
		➢Recommendations
		➢*Considerations in Developing an Implementation Plan*
		➢Team Photo

8:30– 9:00 **REVIEW CS, FS, METRICS, & RECOMMENDATIONS**	**Purpose:** • Review the work that has already been done in the Current and Future State sessions. • To link the work of this group to what has already been done and lay a foundation for the work to be done today. • Bring team members together as they prepare to develop their implementation plan from their recommendations. • Model good project management skills. **Methodology:** • Review the work already done in CS and FS. • Emphasize that the Future State is not on the agenda for today – that that work has been done (is <u>not</u> up for grabs). Today's work is to take the recommended process and develop the implementation plan for this first iteration of their incremental move toward their ideal future state.	• On the Wall: CS, FS, Recomm. notes

Time/Topic	Purpose and Method	Materials Resources
9:00– 9:15 **WORKSHEET: IMPLEMENTA-TION PLAN CONCEPTS**	**Purpose:** • Start to develop p's familiarity with the Implementation Plan work to be done today. • To continue to link team members together as they prepare to implement their plan. • Model good project management skills. **Methodology:** • Ask each participant to individually and quickly read the *Implementation Plan Worksheet* in order to **start** to familiarize themselves with the work that they are about to do. • Ask them to read the *Considerations in Developing an Implementation Plan*. **PW p. 42**	• PW p. 41 Worksheet: Implementation Plan • *Considerations in Developing an Implementation Plan* PW p. 42

9:15 – 10:00
 	
OUTCOMES & MEASURING IMPROVEMENT/ SUCCESS
	Purpose:
	• Measure the projected improvements in the future state.
	• Reinforce the value of using data when identifying improvement and improvement opportunities.
	
	Methodology:
	• Ask and discuss with the team what measures they might use to determine if proposed changes/activities are successful? To determine if they're actually improvements?
	• Ask: *What is a measure? What is the difference, if any, between an outcome and a measure? What is a good measure? How will you track it?*
	    ➢ Remember the following useful format for measures:
	
	      • *An action verb [to reduce]*
	      • *Measurable output [internal errors at XX process]*
	      • *Quantity improvement [by 50%]*
	      • *Time frame [by December 22]*
	
	• Ask and discuss how they will determine if the changes are seen as actual improvements by the customer(s)/client(s), the staff, and by other stakeholders?	

10:00 – 10:15 **BREAK**	• Meet with your practitioner team. Elicit feedback and make any course corrections.	

10:15 – 11:15
 	
IDENTIFY CHANGE ACTIVITIES
	Purpose:
	• Create a plan to move from the current state to the future state that team members are willing to commit to make happen.
	• To begin to identify specific change activities need to move to the future state.
	• To continue to link team members together as they prepare to implement their plan.
	• Model good project management skills.
	
	Methodology:
	• Break out into groups.
	    ❑ Ask team members to count off 1 through 3 (depending on size of team).
	• Tell the groups: That they will now "brainstorm" as a group the changes and activities needed to move from the Current State to the Future State: What must be done to bring about the changes?
	• Emphasize that they need to **:**
	    ❑ Do this work **quickly !**
		• Worksheet: Implementation Plan (paper or computer) **PW p. 43 & 44**
		
		• Calendars
		
		• Flip Chart for each group

Time/Topic	Purpose and Method	Materials Resources
	❑ Keep the items brief. ❑ Review all the ideas from the Current & Future States. • Ask them to record their proposed change activities and tasks on the flip charts for each group.	
11:15 – 12:00 **BEGIN PRIORITIZA-TION OF CHANGES**	**Purpose:** • Same • To prioritize change activities **Methodology:** • Ask each group to **briefly** report their proposed change activities to the rest of the team. (No more than 10 minutes each.) Explanations and justifications are <u>not</u> needed at this point. • When all the groups are done, ask them to move/tape their flip chart notes in a central place. - - - - - - - - - - - - - - - - - - • Multi-voting: Explain that each individual team member will now be able to "vote" for the change activities that each believes to be most important: ❑ Each person will be given 5 dots to place on the activity(ies) they wish. It can be a single dot on five items; all five dots on one item; or any combination the team member wishes. ❑ Explain that this allows them to "weight" how the items are prioritized and/or to help decide how inclusive the implementation is. ❑ They have 5 minutes to do this.	• Flip Charts (brought together/ centralized) • Red Dots
12:00 – 12:30 **LUNCH**	• Meet with the staff. Elicit feedback and make any changes to improve the experience for the team. • Assess where the team is and adjust afternoon time frames accordingly. If needed, prep the VSM manager to begin thinking about the report to the sponsor that will happen at the end of the day.	
12:30 – 2:00 **BEGIN/ CONTINUE DEVELOPMENT OF THE IMPLEMENTA-TION PLAN**	**Purpose:** • Same **Methodology:** • Explain that the <u>whole team</u> will now work on developing the new process implementation plan. • Remind the p's that this is the beginning of an incremental change and improvement process – that this is their first cut at it, their first incremental steps. • Ask the p's to**:** ❑ "Step back" from the Change Activity Sheets and look at the distribution of the dots (votes). ❑ Ask the team members to count and one of them to come up and write the number of the votes beside the activity directly on the sheets. (The team may observe that some of the activities may be duplicated & the votes need to be combined.) • Explain that the entire team will now begin building the implementation plan, using <u>their</u> change activities and prioritization. ❑ Ask which change(s)/activity(ies) received the highest priority (most votes). • Ask the p's to**:** ❑ Name a Change they would make first (and so on) and the Actions/activities and tasks needed to achieve to it. Be sure that change/activity language is used. ❑ Identify the Responsible Person & planned Due Date for each.	• Flip Charts

Time/Topic	Purpose and Method	Materials Resources
	❑ Provide the Measure(s) to determine if the change has been successful and is an improvement. ❑ Complete the other information (barriers, gains, etc.) ❑ Consider the relationships of the activities (e.g. does one have to be done before another can be started? Do any have to start or end at the same time? Etc.) • Document these plan changes/activities/tasks on a new flipchart (or if electronic, on a large, projected plan) • Be sure to get consensus on items as they are added to the plan. • Continue this work until all the changes & related activities and information are completed.	
2:00 – 2:15 **BREAK**	• Meet with your staff. Elicit feedback and make any course corrections. Set-up for implementation.	
2:15 – 4:00 **FINISH IMPLEMENTA-TION PLAN**	**Purpose:** • Same • Recognize that the work is not finished and provide a structure and mechanisms within the implementation plan for follow-up. **Methodology:** • Continue till complete. • Set date(s) to re-convene the team to confirm the work that has been done & to checkpoint that Changes are being implemented – as well as to modify/correct any egregious gaps/actions discovered in the Plan. • VSM Manager(s) to schedule Kaizen and other follow-up activities, including other parallel and sub-processes. Elicit who will work with VSM Manager and Practitioner to make that happen. [See Chpt. 8: Kaizens in CI-P Manual] **PW p. 45.** • Facilitate a discussion that results in the team committing to regular times to discuss and monitor/track progress to the plan, acknowledge successes, and get help removing barriers. These could be regular monthly Implementation Progress meetings for the whole team and other checkpoint meetings as appropriate for specific changes/activities. • Include how the team will get help when needed. It could be facilitation, support, decisions, coordination, etc. • Ask participants if there are other activities/tasks needed to manage the implementation of the plan effectively (for example, establishing team communication lines/methods). • Include all these in the implementation plan itself as the Management of the plan. *NOTE: **This is not optional.** How this happens is up to the team (Video-conferencing; Web meetings, conference calls, etc.). That it happens is not. If needed, work with the Sponsor/Manager to facilitate follow-through with the regular (weekly?) team follow-up.*	

Time/Topic	Purpose and Method	Materials Resources

4:00 – 4:30
 	
NEXT STEPS, WRAP-UP & ADJOURN
	Purpose:
	• Acknowledge the work completed, plan next steps, and give appreciation to each other.
	
	Methodology:
	• Practitioner summarizes action items – next 3 things that will happen, with name, when, and where.
	• Check-out: Round robin,
	
	    – **Ask p's to give a word or a sentence about what they appreciate about the work the team has completed.** – OR
	    – Ask for one plus and one opportunity for improvement.
	
	• Ask p's to complete the suggestions/recommendations sheet and leave it by the door.
	
	• You will then be adjourned.	

Two weeks + 30 days +
 	
CI-P CLIENT FOLLOW-UP
	Purpose:
	• To support the sponsor and manager to follow-up with the VSM team to assure implementation and removal of barriers.
	• Elicit feedback from the client to the practitioner on what went well and what developmental feedback the client has for the practitioner.
	• Close the contract or re-contract.
	
	Methodology:
	• Prepare VSM process summary report for sponsor/manager ASAP.
	• Within two weeks of VSM, meet with the Sponsor and Manager.
	    - Review outcomes to date from the team
	    - Elicit what is working well and what the Sponsor or VSM manager may need for support. If needed, facilitate feedback between the sponsor and the manager.
	    - Schedule any follow-up.
	    - Ask for feedback as a practitioner – Is there any feedback you would like to give me that could improve my work as a practitioner or the way we have worked together?
	• Ask if there is anything they need from you to support their 30, 60, and 90-day (monthly) follow-up with Department Director / Leadership / Steering committee?
	• Be very specific about reviewing action items that they had – and ask how to support them to completion.
	• Review your "contract" and give appreciation.	

DOCUMENT & COMMUNICATE	**Purpose:** • Document and communicate work in order to track system improvements and increase learning for the community of practitioners. **Methodology:** [Optional] • Within two weeks of VSM, provide a summary of results in an A3 format (including text format and poster) to give to the team, to BTC, and the commissioner. • Send electronic spreadsheet, flowcharts, and other materials to BTC for central data collection files and posting to the BTC web site. • Reflect on learnings and bring highlights to CI-P Clinical for expanded learning.	
Celebrate!		

Worksheet:

Future State Implementation Plan

Purpose: The purpose of this task is to identify those activities necessary to move from the Current State to the Future State. Here, Lean principles are directly applied to the wastes identified, and specific actions/activities are planned and assigned. Changes and Actions/Activities included on the Plan should be able to be accomplished in a minimum of time (Immediately, 30, 60, 90 days), including for long-range changes. Remember that this is an incremental improvement process.

Task:

- Using the ideas the D.O. and Future State teams generated, you will build an Implementation Plan to move Adoption Services from the Current State to the Future State.
- Keep in mind the "Lean Concepts to Evaluate Your Transformation From Current to Future State." Apply them wherever appropriate.
- Remember, that your implementation plan should include both what you can do quickly and easily <u>and</u> what will require more time.

    o Focus on no-cost, low-cost fixes that can be implemented immediately first and/or any that are critical. Then include those that will take more analysis and more time to implement.
    o Kaizen events and other rapid improvement events may be entered as actions/activities on the Implementation Plan.
    o Some of your changes may require the formation of task groups and other more intensive efforts. These should be a part of your plan as incremental activities needed to reach the long-range change.

- Follow-up with CI-Practitioners should be included as a line item(s) on the Implementation Plan.

Value Stream Map Plan (Excel Spreadsheet)

1. Review all the recommended activities in the spreadsheet in your Participant Workbook in the recommended "Change" and "Action/Activities" columns.
2. Ask yourself if there are additional changes or modifications that will be needed & add the action/activities to implement those changes.
3. Define the measure(s) you will use to determine if the change itself is (1) successful and (2) an actual improvement.
4. Add any perceived barriers or challenges so that the Sponsor can help remove them.
5. After you have completed this work:

    a. Suggest a Responsible Person for each change/action and add to Plan. The Responsible Person should be a person with the authority and influence to remove barriers to that specific change/activity.
    b. Suggest a planned Due Date for each Change and Action/Activity and add to Plan – Remember that the due date is not necessarily the date the entire change will be complete. It may be the date the evaluation of the recommendation is complete. However, in that case, the action under the Change should be stated as the evaluation being done.

VSM Implementation Plan (Template)

Value Stream Map Plan:

RECOMMENDATION	ACTION	RESP. PERSON	PERCEIVED BARRIERS	DUE DATE	DATE COMP.	EST. GAINS	EST. DAYS SVD/YR	EST. $ SAVED /YR	ACTUAL GAINS

Questions to Consider in Developing the Implementation Plan

❑ What are the changes being proposed?

❑ Which changes should be implemented first?

- Which problems/changes are priorities for OCFS? For the Child?

- Which changes address key organizational goals?

❑ What specific actions/activities must be taken to bring them about successfully?

❑ How will the changes be implemented?

❑ Who is the staff person responsible for implementing the change successfully – who has the commitment, authority, influence, and time to assure implementation, to remove barriers to change?

❑ What are the measures needed to determine if the changes are successful? To determine if they're actually improvements?

- How will it be determined if the changes are seen as actual improvements by the child, the adoptive parents, and by staff?

❑ How will input from clients, staff, and external sources be obtained regarding possible improvements, best practices, etc.?

❑ How will any adjustments be made to the proposed changes if they are found not to work or to be actual improvements after all?

❑ Are there any significant problems related to this process that must be addressed in order to get to the future state for this process?

❑ Are there any changes, barriers, other processes, or issues outside this process that must also be addressed in order to get to the future state for this process?